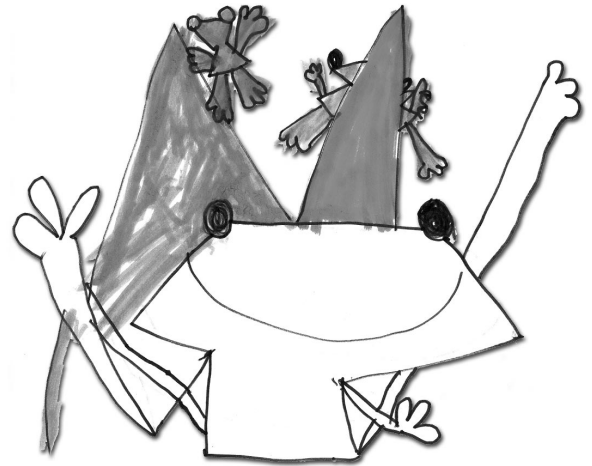


3. DOCUMENTATION

One of the best ways for an advocate to serve a child in dependency is to keep accurate records. Many of these children change schools, service providers, social workers and caregivers regularly. Accurate records provide continuity and valuable information about the child's history. These records can be used to evaluate potential concerns, patterns of behavior or problems.



Documentation includes written information about the child's educational needs, and service, health, developmental and placement history.

Documentation can also be helpful when there is confusion or disagreement about what was said, or what happened and can be used as evidence if there is a legal dispute.

Advocates can organize documentation by using a:

Journal (can be a bound notebook or loose-leaf binder)

- To write down any concerns about the child. Each entry should be dated and include observations and concerns. The journal can also contain potential ways to address concerns and any advocate plans to take action.
- A journal can also be used to record a summary of the child's placement, service and health history, including whether or not services were effective.
- If the child is or has been on medication, the advocate should also record the child's medication history, including the child's responses to those medications.

Logs (can be separate or in the same spiral or binder as the journal)

- The log can include information about telephone calls, meetings, and correspondence between the advocate and the school staff, and supporting agencies, such as the regional center or child welfare services.

Logs can include:

- Person contacted
 - When
 - How (in person, on the phone, by letter)
- The reason for the contact (to set up meeting dates, ask questions...)
 - Specifics (the advocate's questions/concerns)
 - How the advocate's concerns, questions were addressed

Calendar

- Logs can also be used to keep track of all meeting dates, dates for follow-up meetings, evaluations, assessments, etc.

Copies

Advocates should also keep copies of all records including:

- Health assessments, including current prescriptions and medication history
- Information about the child's development, growth and delays in any area
- Educational assessments
- Report cards
- Attendance records
- Consent forms
- Current and former Individual Education Plans-covered later in this publication
- Letters and notes from and to school officials and teachers, and other service providers including doctors, psychologists, etc.

For CASAs, copies of relevant documents can be kept on file at the CASA office.

Letters

Letters often prevent confusion and can be used to establish a permanent record of advocate concerns, requests and understanding of agreements.

Letters should be written to:

- Document initial concerns—alert/inform the social worker, teacher, care provider of concerns and potential problems
- Request action by the school or supporting agencies (for meetings, referral, assessments, follow-up meetings, etc.)
- Verify the advocate's understanding of any verbal agreements (scheduling follow-up evaluations/meetings, etc.)



The advocate should expect the letter to be effective and should write with a positive attitude.

To write an effective letter:

- Date the letter
- Address to the person in charge of the area in question (special education director, dean in charge of discipline)
- Include the child's name, age, grade and teacher (placement in school)
- Introduce the advocate, including the advocate name and relationship to the child
- Provide very brief *relevant* history of the situation leading up to the advocate concerns
- State the purpose of the advocate's letter, i.e., to document a concern, request a meeting, or Student Study Team referral, refer a child for assessment for possible special education, follow-up, etc.)
- Include relevant observations (made by the advocate or others)
- End letter by repeating the advocate request/purpose and the advocate expectation for a timely response
- Provide contact information including address, and phone number

Sample letters are located in the Appendix.

Before sending the letter the advocate should:

- Wait a day or two and reread to ensure that it is polite and clearly written
- If possible (respecting confidentiality), ask someone else to proofread the letter to check grammar, tone and clarity

Make a photocopy of the letter for the advocate's records.

- Send the letter registered mail. This will provide proof that the advocate sent the letter.

For more information:

North Coast Parents Helping Parents

Eureka, CA
707-441-8400

Court Appointed Special Advocates (CASA)

2356 Myrtle Ave
Eureka, CA 95501
707-443-3197

PACER Center

952-838-9000
Information and Support for families
with children with disabilities

Protection and Advocacy, Inc.

100 How Ave. Ste 235N
Sacramento, CA 95825
916-488-9950
800-776-5746

Disability Rights Education and Defense Fund

2212 Sixth Street
Berkeley, CA 94710
510-644-2555

Indian Action Council

707-443-8401

Humboldt Council of the Blind

707-839-7266

Deaf Counseling, Advocacy and Referral Service

2127 Harrison Ave.
Eureka, Ca 95501
707-476-8680